

About Requisitions:

A requisition is generally the first step in requesting the procurement of goods and/or services and is required for all inventory items. For specific details related to inventory requisitions please refer to the course titled **501 PR347 Inventory Issuances and Restock**.

For non-inventory items and services, a requisition is used to assign buyers, track the progress, and status of a purchase request. Requisitions can be created from existing contracts, copied from other requisitions, or created ad-hoc. All requisitions must be approved by a supervisor before they can be executed via a purchase order (PO) or contract.

Please refer to the course titled **501 PR342: Processing Requisitions** for more information on creating and maintaining regular requisitions using the Procurement and eProcurement modules.

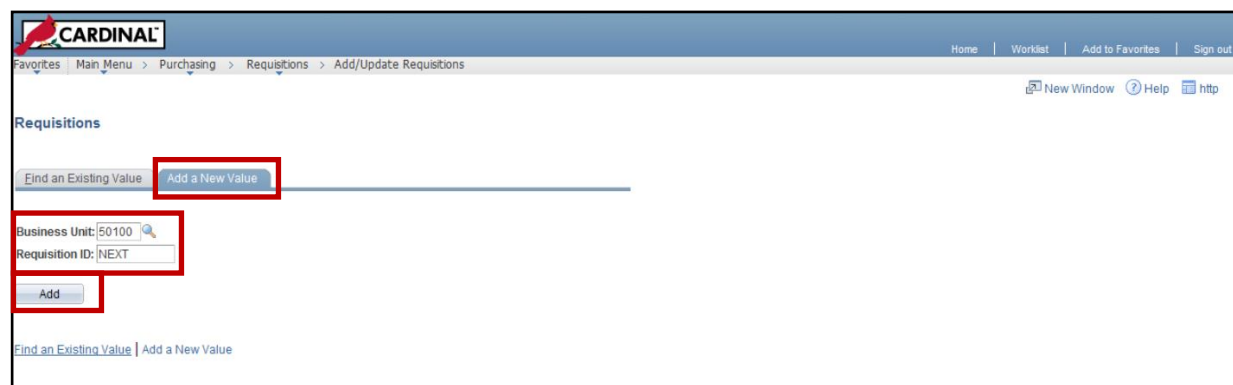
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Create a New Requisition (Beginning Steps for All Requisitions)

- 1 Navigate to the **Requisitions** page using the following path:

Main Menu > Purchasing > Requisitions > Add/Update Requisitions



The screenshot shows the 'Requisitions' page in the Cardinal system. The breadcrumb trail at the top reads 'Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions'. The 'Add a New Value' tab is selected and highlighted with a red box. Below the tabs, the 'Business Unit' is set to '50100' and the 'Requisition ID' is set to 'NEXT', both fields are highlighted with red boxes. The 'Add' button is also highlighted with a red box. At the bottom of the form, there are links for 'Find an Existing Value' and 'Add a New Value'.

- 2 Select the **Add a New Value** tab:
 - a. **Business Unit = 50100**,
 - b. **Requisition ID = NEXT** and should not be changed. Cardinal assigns a **Requisition ID** number when you successfully save the requisition.
- 3 Click **Add**. The **Maintain Requisitions – Requisitions** page will display.

Create Requisitions From Contracts and Requisitions

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window Help

Maintain Requisitions

Requisition

Business Unit: 50100 *WebIMS Req Type: Regular Status: Open ☒

Requisition ID: NEXT

Requisition Name: [Copy From](#) ☐ Hold From Further Processing

Header

*Requester: MIKE.HALL [Hall, Mike \(VDOT\)](#)

*Requisition Date: 03/27/2013 [Requester Info](#)

Origin: ONL [Online Input](#)

*Currency Code: USD Dollar

[Requisition Defaults](#) [Add Comments](#) [Requisition Activities](#)

Card Number: Expiration Date: ☐ Use Procurement Card

Amount Summary

Total Amount: 0.00 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)

[Item Search](#) [Requester Items](#)

Line

Details **Ship To/Due Date** Status Vendor Information Item Information Attributes Contract Sourcing Controls WebIMS

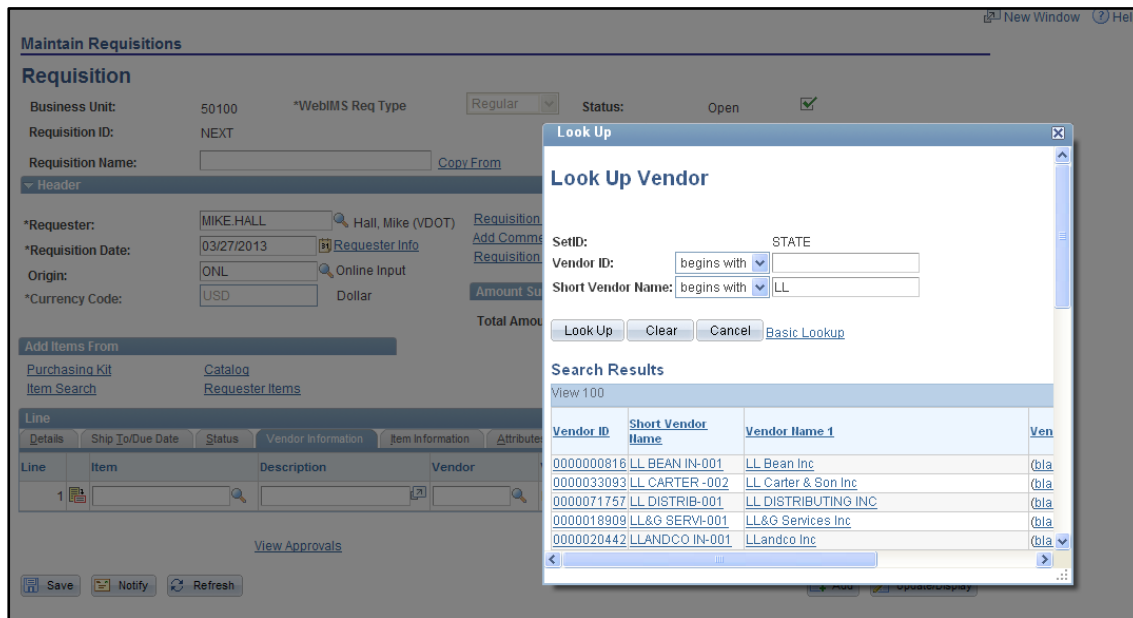
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	<input type="text"/>	<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>	0	0.00	Open

[View Approvals](#) *Go to:

- 4 The **Header** section contains some key data to include **Requester**, **Requisition Date**, and **Origin**.
- 5 Default information, such as **Requester** and **Ship To** values, will automatically populate based on your user setup, but can be changed as necessary. The **Ship To/Due Date** tab allows you to select desired date and modify the **Ship To** location.
- 6 Please refer to the course titled **501 PR342 Processing Requisitions** for more detailed instructions.

Create Requisitions From Contracts and Requisitions

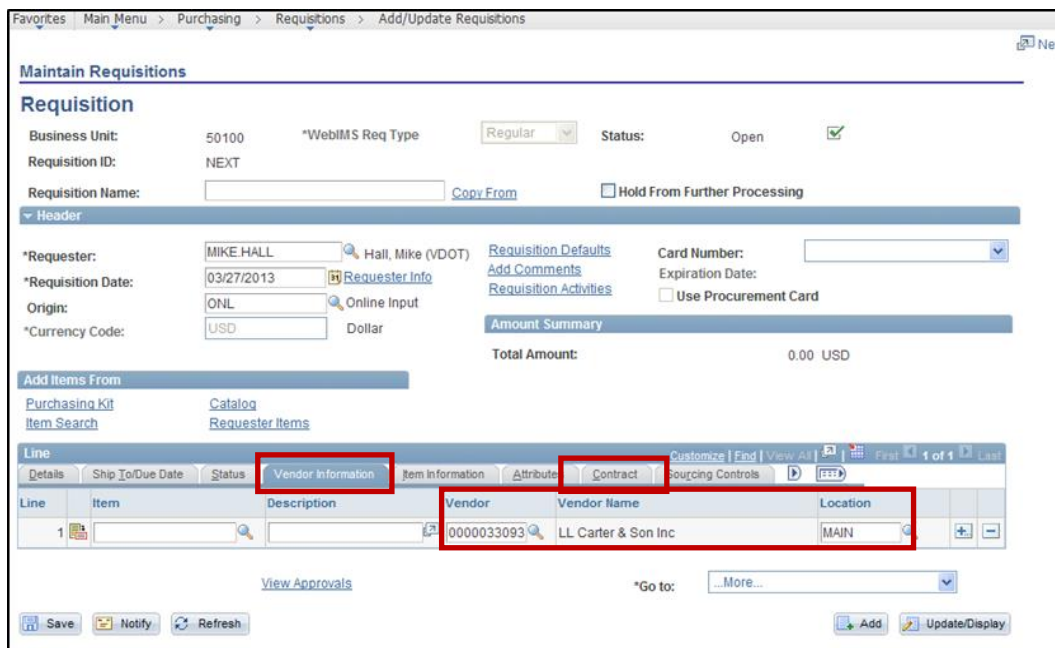
Create a Requisition (1 Item/Line) from a Contract:



The screenshot shows the 'Maintain Requisitions' window. The 'Requisition' header section includes fields for Business Unit (50100), Requisition ID (NEXT), and Requisition Name. The 'Header' section shows the requester (MIKE HALL), date (03/27/2013), origin (ONL), and currency (USD). A 'Look Up Vendor' dialog box is open, displaying search results for vendors. The dialog box has fields for SetID, Vendor ID, and Short Vendor Name, and a table of search results.

Vendor ID	Short Vendor Name	Vendor Name 1	Vendor Name 2
0000000816	LL BEAN IN-001	LL Bean Inc	(b)la
0000033093	LL CARTER -002	LL Carter & Son Inc	(b)la
0000071757	LL DISTRIB-001	LL DISTRIBUTING INC	(b)la
0000018909	LL&G SERVI-001	LL&G Services Inc	(b)la
0000020442	LLANDCO IN-001	LLandco Inc	(b)la

- 1 Click on the **Vendor Information** tab.
- 2 Search for vendor related to the contract. The **Vendor Information** tab displays vendors related to the selected Item. You can search for and select any vendor that you wish to display.
- 3 Click on the selected vendor hyperlink. The selected vendor's information will populate.



The screenshot shows the 'Maintain Requisitions' window with the 'Contract' tab selected. The 'Vendor Information' tab is also visible. The 'Contract' tab displays the selected vendor's information, including Vendor ID (0000033093), Vendor Name (LL Carter & Son Inc), and Location (MAIN). The 'Amount Summary' section shows a Total Amount of 0.00 USD.

Line	Item	Description	Vendor	Vendor Name	Location
1			0000033093	LL Carter & Son Inc	MAIN

- 4 Click on the **Contract** tab.

Create Requisitions From Contracts and Requisitions

Maintain Requisitions

Requisition

Business Unit: 50100 *WebIMS Req Type Regular Status: Open ☒

Requisition ID: NEXT

Requisition Name: [Copy From](#) ☐ Hold From Further Processing

Header

*Requester: MIKE HALL [Hall, Mike \(VDOT\)](#) [Requisition Defaults](#) Card Number:
 *Requisition Date: 03/27/2013 [Requester Info](#) [Add Comments](#) Expiration Date:
 Origin: ONL [Online Input](#) [Requisition Activities](#) ☐ Use Procurement Card
 *Currency Code: USD Dollar

Amount Summary

Total Amount: 0.00 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Line

Line	Item	Description	Contract ID	Contract Version	Contract Line	Category Line Number	Use Contract if Available
1	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>

[View Approvals](#) *Go to:

5 Click **Contract Search** icon.

Contract Search

Search Criteria

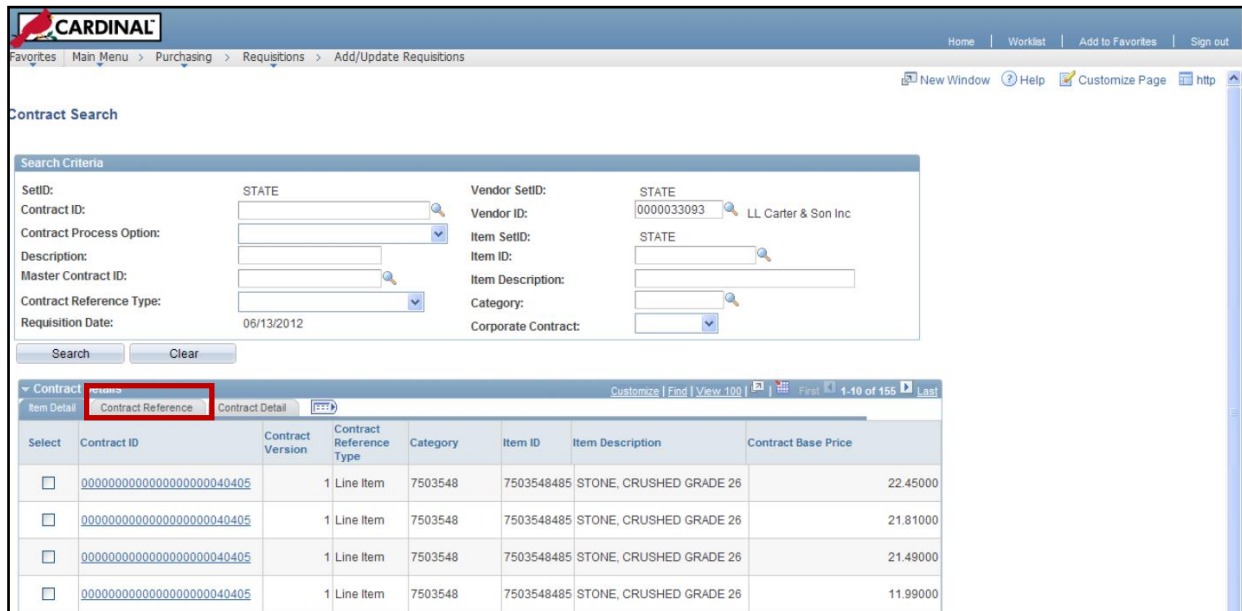
SetID: STATE Vendor SetID: STATE
 Contract ID: Vendor ID: 0000033093 [LL Carter & Son Inc](#)
 Contract Process Option: Item SetID: STATE
 Description: Item ID:
 Master Contract ID: Item Description:
 Contract Reference Type: Category:
 Requisition Date: 06/13/2012 Corporate Contract:

[Contract Details](#)

6 The **Contract Search** page is displayed with the selected **Vendor ID** prepopulated.

7 Click the **Search** button to initiate the search for contracts related to the selected vendor.

Create Requisitions From Contracts and Requisitions



Contract Search

Search Criteria

SetID: STATE Vendor SetID: STATE
 Contract ID: Vendor ID: 0000033093 LL Carter & Son Inc
 Contract Process Option:
 Description:
 Master Contract ID:
 Contract Reference Type:
 Requisition Date: 06/13/2012
 Item SetID: STATE
 Item ID:
 Item Description:
 Category:
 Corporate Contract:

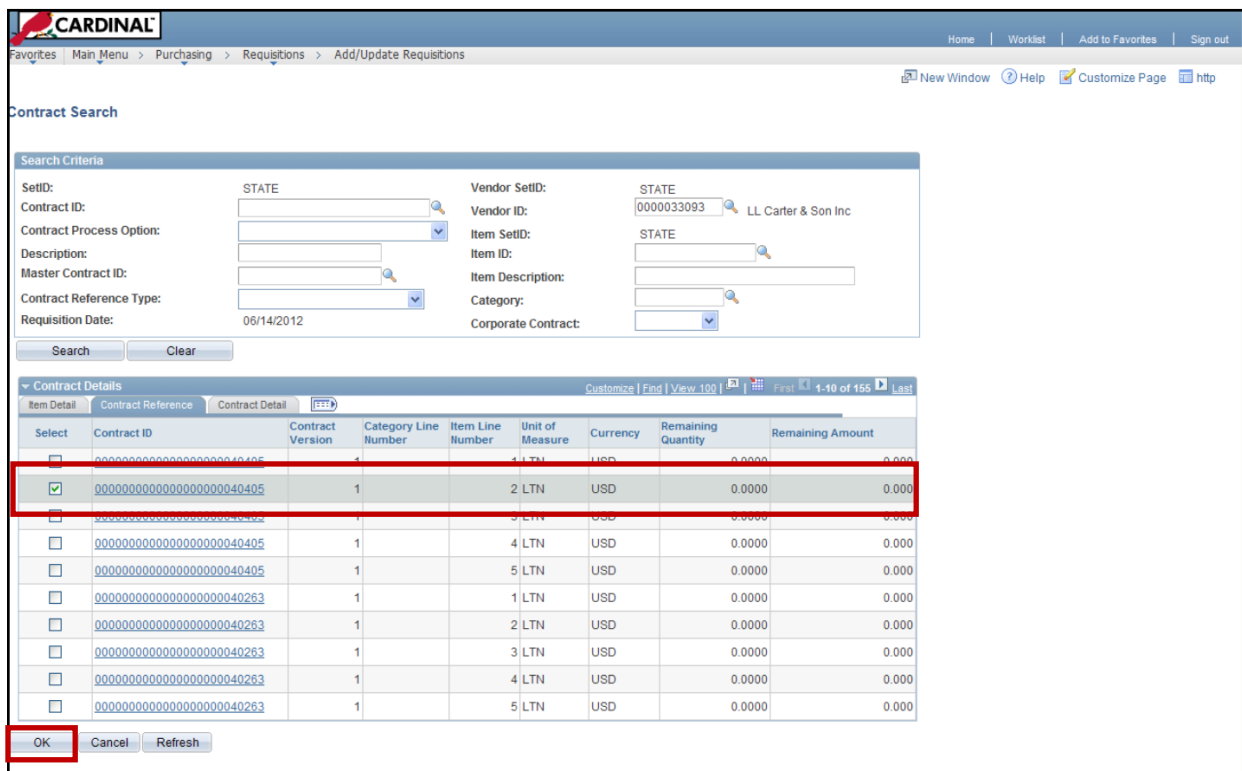
Search Clear

Contract Details

Item Detail **Contract Reference** Contract Detail

Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price
<input type="checkbox"/>	00000000000000000000000040405	1	Line Item	7503548	7503548485	STONE, CRUSHED GRADE 26	22.45000
<input type="checkbox"/>	00000000000000000000000040405	1	Line Item	7503548	7503548485	STONE, CRUSHED GRADE 26	21.81000
<input type="checkbox"/>	00000000000000000000000040405	1	Line Item	7503548	7503548485	STONE, CRUSHED GRADE 26	21.49000
<input type="checkbox"/>	00000000000000000000000040405	1	Line Item	7503548	7503548485	STONE, CRUSHED GRADE 26	11.99000

- 8 All contracts with lines for the selected vendor display as shown.
- 9 Click the **Contract Reference** tab to see the lines for each contract.



Contract Search

Search Criteria

SetID: STATE Vendor SetID: STATE
 Contract ID: Vendor ID: 0000033093 LL Carter & Son Inc
 Contract Process Option:
 Description:
 Master Contract ID:
 Contract Reference Type:
 Requisition Date: 06/14/2012
 Item SetID: STATE
 Item ID:
 Item Description:
 Category:
 Corporate Contract:

Search Clear

Contract Details

Item Detail **Contract Reference** Contract Detail

Select	Contract ID	Contract Version	Category Line Number	Item Line Number	Unit of Measure	Currency	Remaining Quantity	Remaining Amount
<input checked="" type="checkbox"/>	00000000000000000000000040405	1		2	LTN	USD	0.0000	0.0000
<input type="checkbox"/>	00000000000000000000000040405	1		3	LTN	USD	0.0000	0.0000
<input type="checkbox"/>	00000000000000000000000040405	1		4	LTN	USD	0.0000	0.0000
<input type="checkbox"/>	00000000000000000000000040405	1		5	LTN	USD	0.0000	0.0000
<input type="checkbox"/>	00000000000000000000000040263	1		1	LTN	USD	0.0000	0.0000
<input type="checkbox"/>	00000000000000000000000040263	1		2	LTN	USD	0.0000	0.0000
<input type="checkbox"/>	00000000000000000000000040263	1		3	LTN	USD	0.0000	0.0000
<input type="checkbox"/>	00000000000000000000000040263	1		4	LTN	USD	0.0000	0.0000
<input type="checkbox"/>	00000000000000000000000040263	1		5	LTN	USD	0.0000	0.0000

OK Cancel Refresh

- 10 To use a line on the requisition, click the checkbox to the left of the selected line. Only one line may be selected to be copied.
- 11 Click **OK**.

Create Requisitions From Contracts and Requisitions

Maintain Requisitions New Window

Requisition

Business Unit: 50100 *WebIMS Req Type: Regular Status: Open ☒

Requisition ID: NEXT

Requisition Name: [Copy From](#) ☐ Hold From Further Processing

Header

*Requester: MIKE.HALL Hall, Mike (VDOT) [Requisition Defaults](#) Card Number:
 *Requisition Date: 03/27/2013 [Requester Info](#) [Add Comments](#) Expiration Date:
 Origin: ONL Online Input [Requisition Activities](#) ☐ Use Procurement Card
 *Currency Code: USD Dollar

Amount Summary

Total Amount: 0.00 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Line

Details [Ship To/Due Date](#) [Status](#) [Vendor Information](#) [Item Information](#) [Attributes](#) [Contract](#) [Sourcing Controls](#) [WebIMS](#) [...](#)

Line	Item	Description	Contract ID	Contract Version	Contract Line	Category Line Number	Use Contract if Available
1	7503548485	STONE, CRUSHED	00000000000000000000000040405	1	5		<input checked="" type="checkbox"/>

[View Approvals](#) *Go to:

[Save](#) [Notify](#) [Refresh](#)

12 The **Item** details from the selected contract line populate the new requisition line.

13 Click the **Details** tab.

Maintain Requisitions New Window Help

Requisition

Business Unit: 50100 *WebIMS Req Type: Regular Status: Open ☒

Requisition ID: NEXT

Requisition Name: [Copy From](#) ☐ Hold From Further Processing

Header

*Requester: MIKE.HALL Hall, Mike (VDOT) [Requisition Defaults](#) Card Number:
 *Requisition Date: 03/27/2013 [Requester Info](#) [Add Comments](#) Expiration Date:
 Origin: ONL Online Input [Requisition Activities](#) ☐ Use Procurement Card
 *Currency Code: USD Dollar

Amount Summary

Total Amount: 538.80 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Line

[Details](#) [Ship To/Due Date](#) [Status](#) [Vendor Information](#) [Item Information](#) [Attributes](#) [Contract](#) [Sourcing Controls](#) [WebIMS](#) [...](#)

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	7503548485	STONE, CRUSHED	24.0000	LTN	7503548	22.45000	538.80	Open

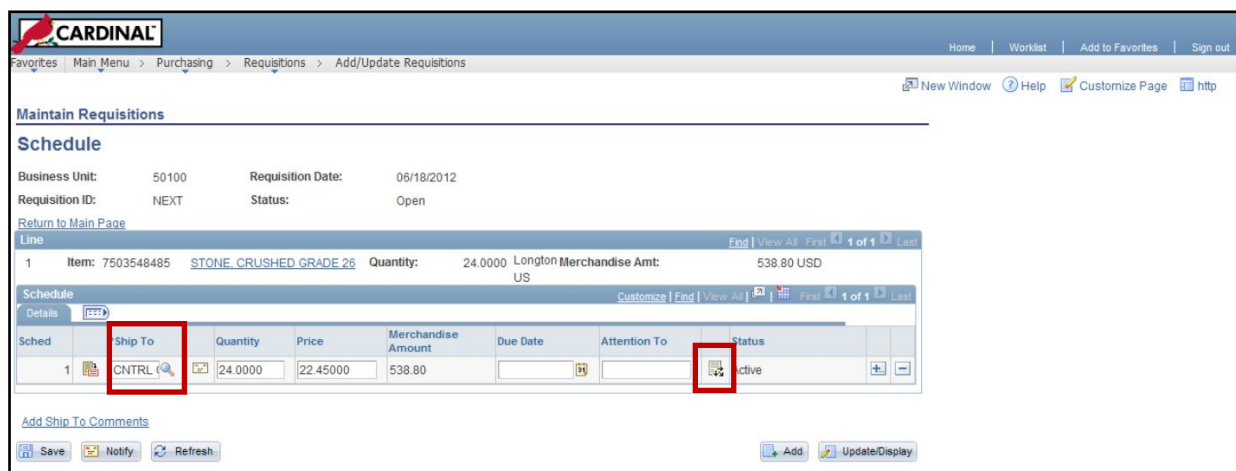
[View Approvals](#) *Go to:

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

14 Enter the **Quantity** requested.

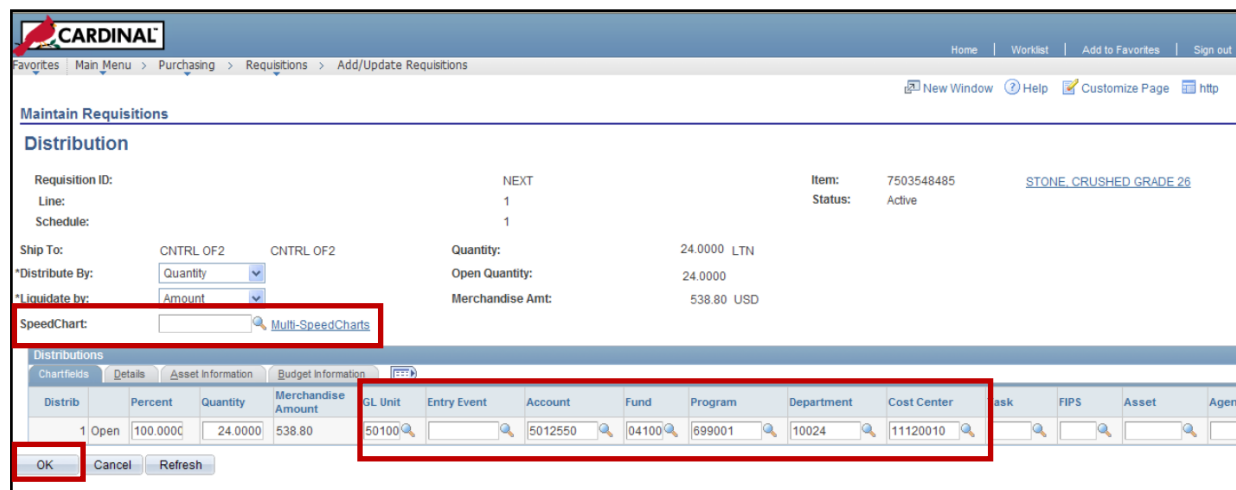
15 Click on **Schedule** icon.

Create Requisitions From Contracts and Requisitions



16 Ship To location is populated based on the user defaults and can be edited if needed.

17 Click on the **Distribution** icon.

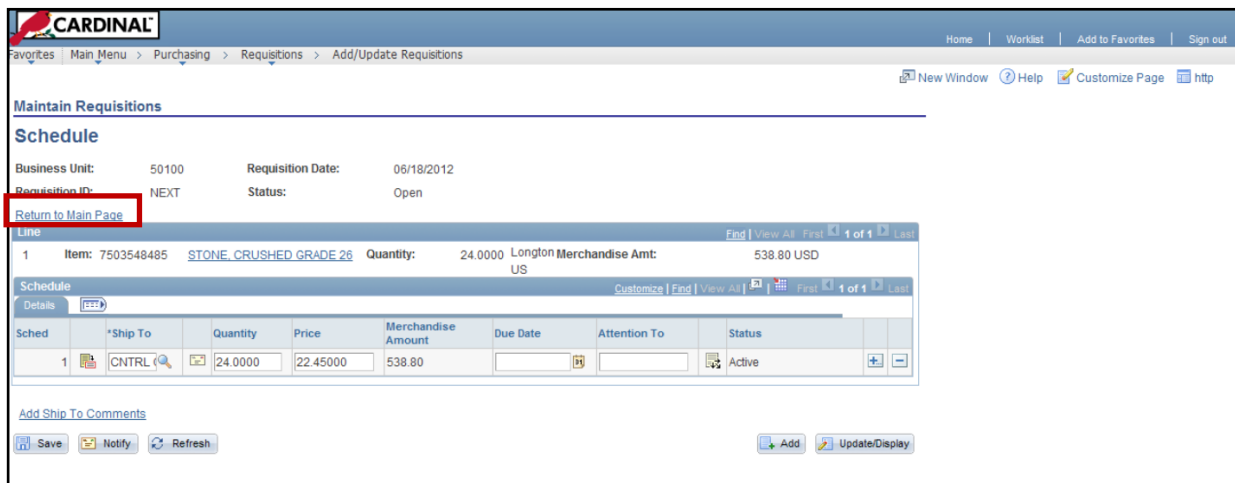


18 Enter valid chart of accounts values. A **Schedule** may have one or more **ChartField** distributions. The **ChartField** values identify the accounting distribution. The insertion of valid **Account**, **Department**, **Cost Center** or **Project** values are required. You can manually enter a ChartField value, or you can use the **Multi-SpeedCharts** hyperlink to select a **SpeedChart** value to automatically populate some of the ChartField values for you.

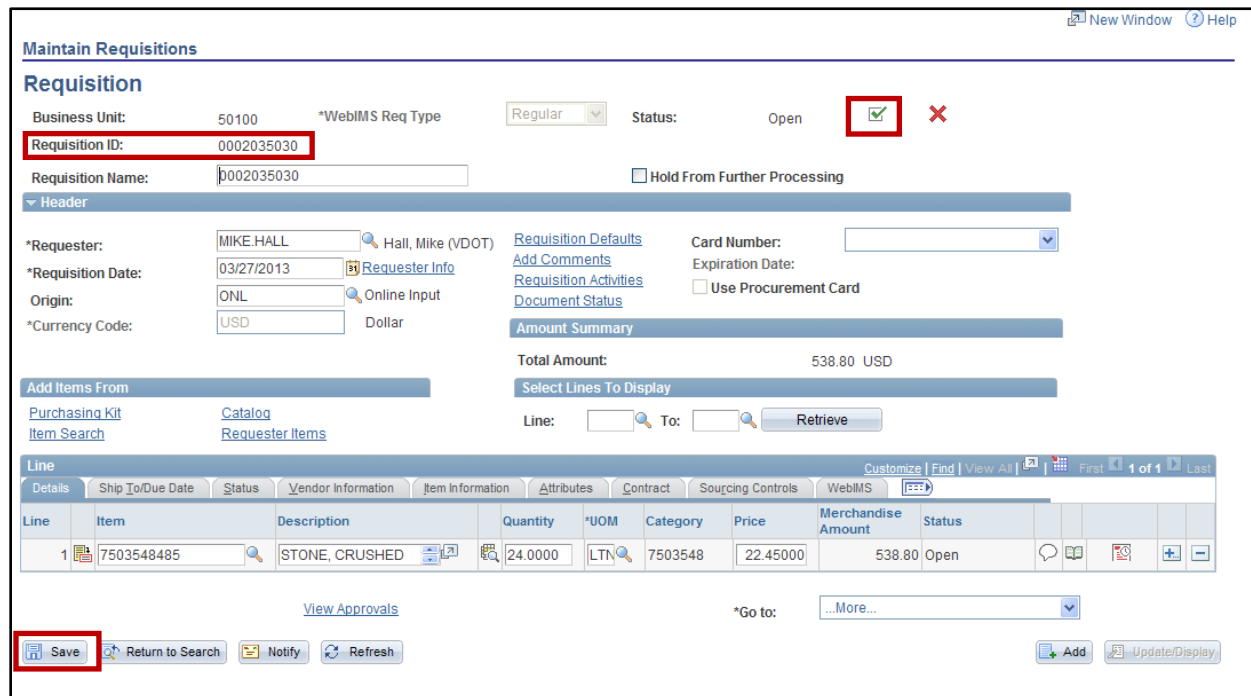
19 You may insert, or delete, additional accounting distributions, by scrolling right and clicking on the + / - icons at the end of the accounting distribution line.

20 Click **OK**. You will return to the **Maintain Requisitions - Schedule** page.

Create Requisitions From Contracts and Requisitions



21 Click on the **Return to Main Page** hyperlink. The **Maintain Requisitions - Requisitions** page displays.

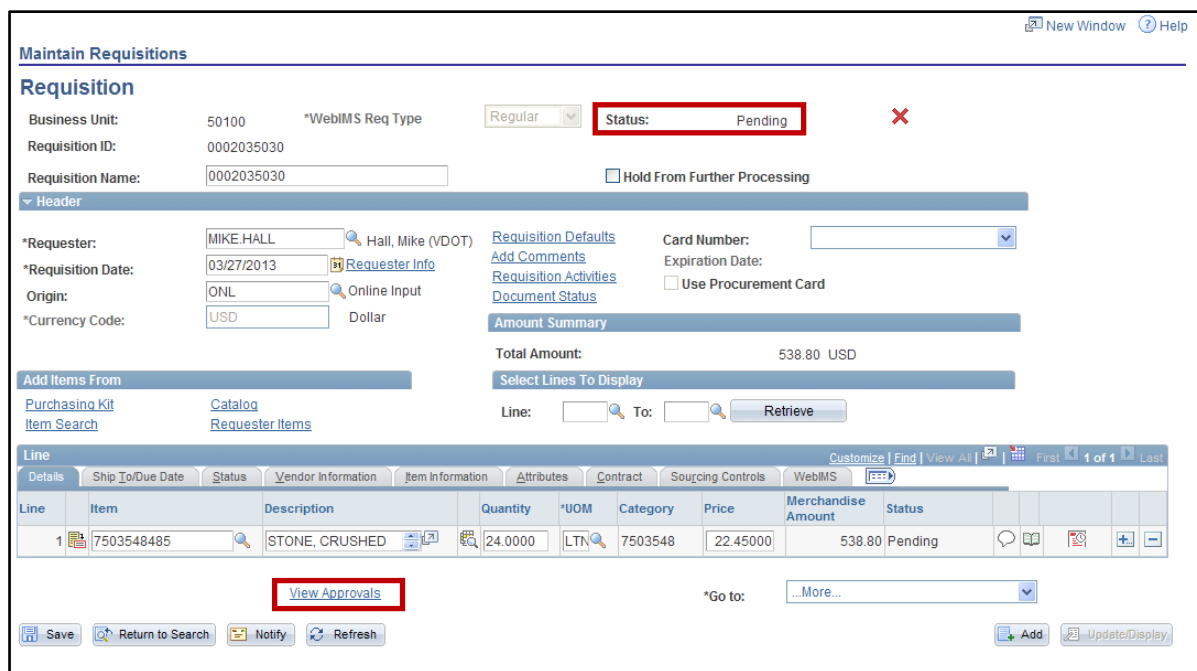


22 Click **Save**.

23 Cardinal assigns a **Requisition ID** number upon save.

24 Click on the **Submit for Approval** checkbox (the green checkmark) which is next to the **Status** field, to send it forward for approval by your supervisor.

Create Requisitions From Contracts and Requisitions



Maintain Requisitions

Requisition

Business Unit: 50100 *WebIMS Req Type: Regular Status: Pending

Requisition ID: 0002035030

Requisition Name: 0002035030

☐ Hold From Further Processing

Header

*Requester: MIKE HALL Hall, Mike (VDOT) [Requisition Defaults](#) Card Number:

*Requisition Date: 03/27/2013 [Add Comments](#) Expiration Date:

Origin: ONL [Requisition Activities](#) ☐ Use Procurement Card

*Currency Code: USD Dollar [Document Status](#)

Amount Summary

Total Amount: 538.80 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)

[Item Search](#) [Requester Items](#)

Select Lines To Display

Line: To: [Retrieve](#)

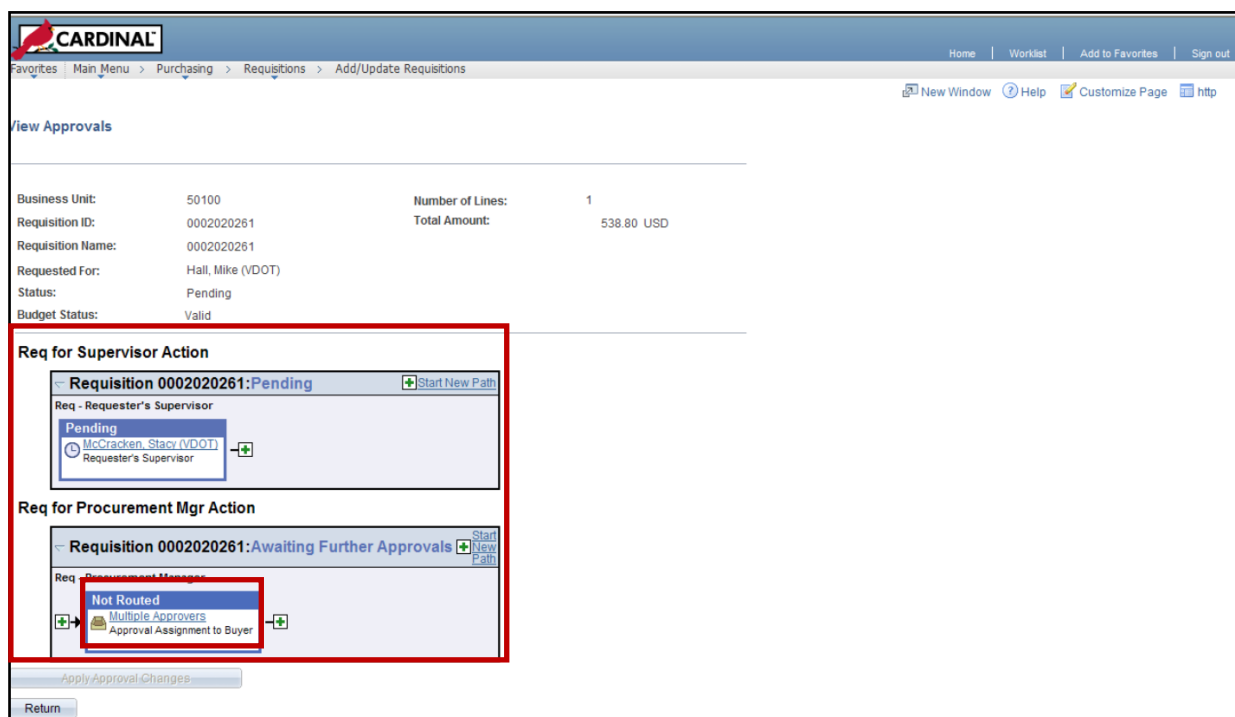
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	7503548485	STONE, CRUSHED	24.0000	LIT	7503548	22.45000	538.80	Pending

[View Approvals](#) *Go to:

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

25 The requisition's **Status** changes to **Pending** and your supervisor is notified via email and worklist.

26 Click on **View Approvals** hyperlink to view the pending and completed approval actions.



View Approvals

Business Unit: 50100 Number of Lines: 1

Requisition ID: 0002020261 Total Amount: 538.80 USD

Requisition Name: 0002020261

Requested For: Hall, Mike (VDOT)

Status: Pending

Budget Status: Valid

Req for Supervisor Action

Requisition 0002020261: Pending [Start New Path](#)

Req - Requester's Supervisor

Pending

McCracken, Stacy (VDOT)

Requester's Supervisor

Req for Procurement Mgr Action

Requisition 0002020261: Awaiting Further Approvals [Start New Path](#)

Req - Procurement Manager

Not Routed

Multiple Approvers

Approval Assignment to Buyer

[Apply Approval Changes](#)

[Return](#)

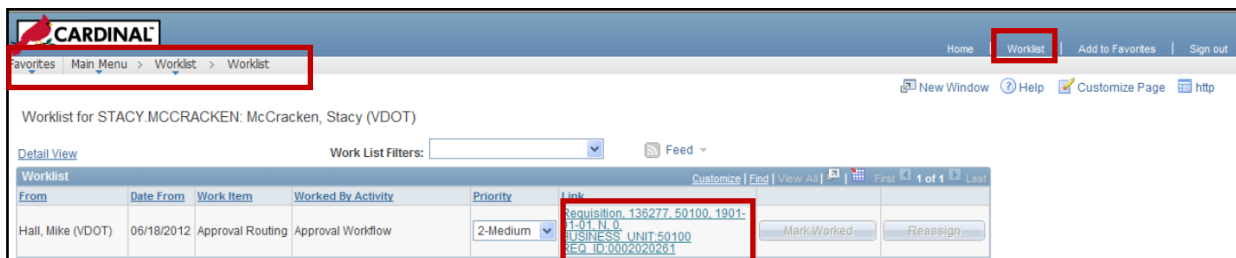
27 To view the list of approvers, click on the Multiple Approver hyperlink.

Create Requisitions From Contracts and Requisitions

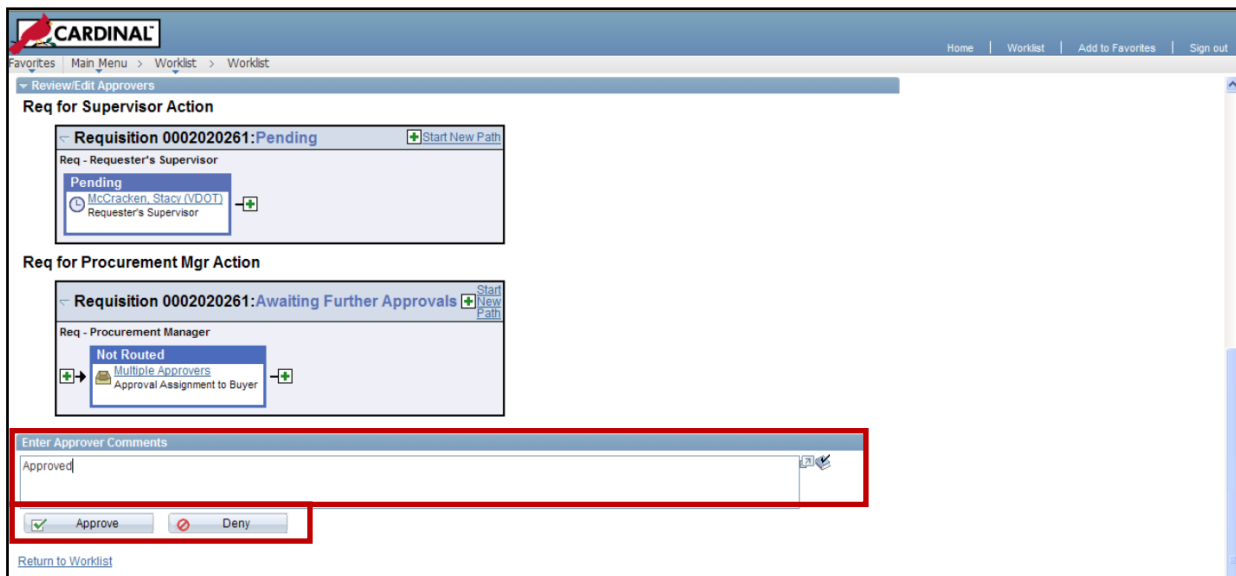
Approver #1	
Name:	Hall, Mike (VDOT)
Empl ID:	0022997300
Department:	10003
Supervisor ID:	
Telephone:	
Reports To Position Number:	00014
Email ID:	xxxmike.hall@vdot.virginia.gov

Approver #2	
Name:	Hudgins, Caroline S. (VDOT)
Empl ID:	00038895600
Department:	10003
Supervisor ID:	
Telephone:	
Reports To Position Number:	22892
Email ID:	xxcaroline.hudgins@vdot.virginia.gov

28 Your supervisor will be notified of the pending approval via email and their worklist.

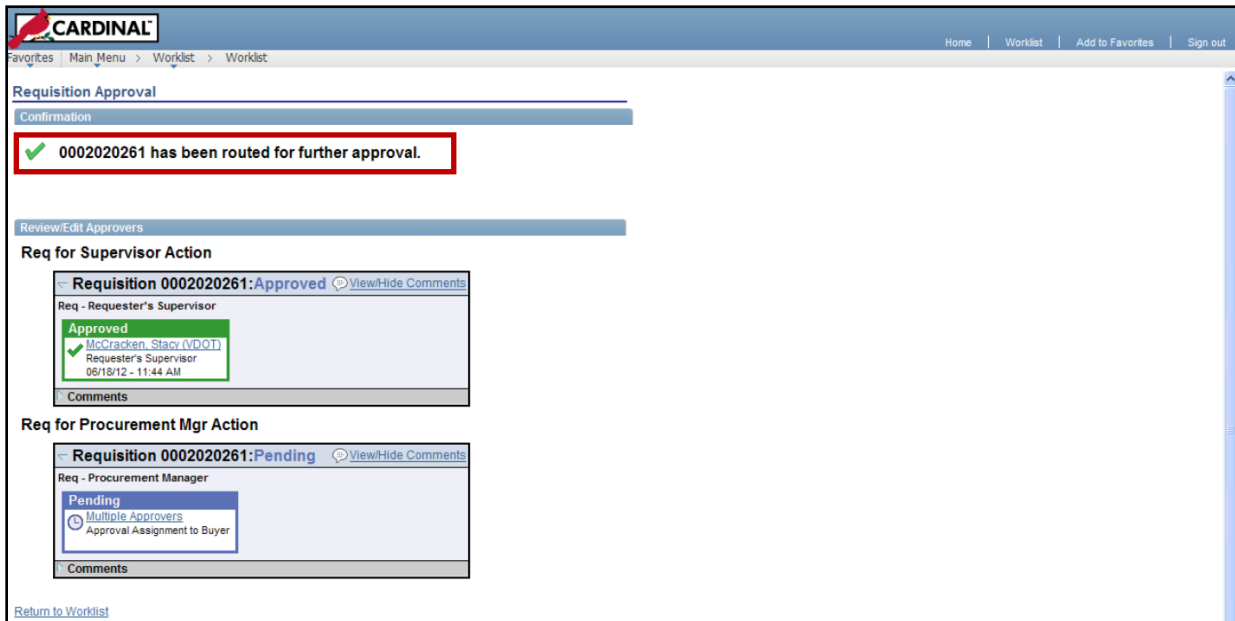


29 From the Worklist your supervisor will click on the requisition's hyperlink.



30 The supervisor may insert a comment, and **Approve** or **Deny** the requisition.

Create Requisitions From Contracts and Requisitions



Requisition Approval

Confirmation

✓ 0002020261 has been routed for further approval.

Review/Edit Approvers

Req for Supervisor Action

Requisition 0002020261: Approved [View/Hide Comments](#)

Req - Requester's Supervisor

Approved

✓ McCracken, Stacy (VDOT)
Requester's Supervisor
06/18/12 - 11:44 AM

Comments

Req for Procurement Mgr Action

Requisition 0002020261: Pending [View/Hide Comments](#)

Req - Procurement Manager

Pending

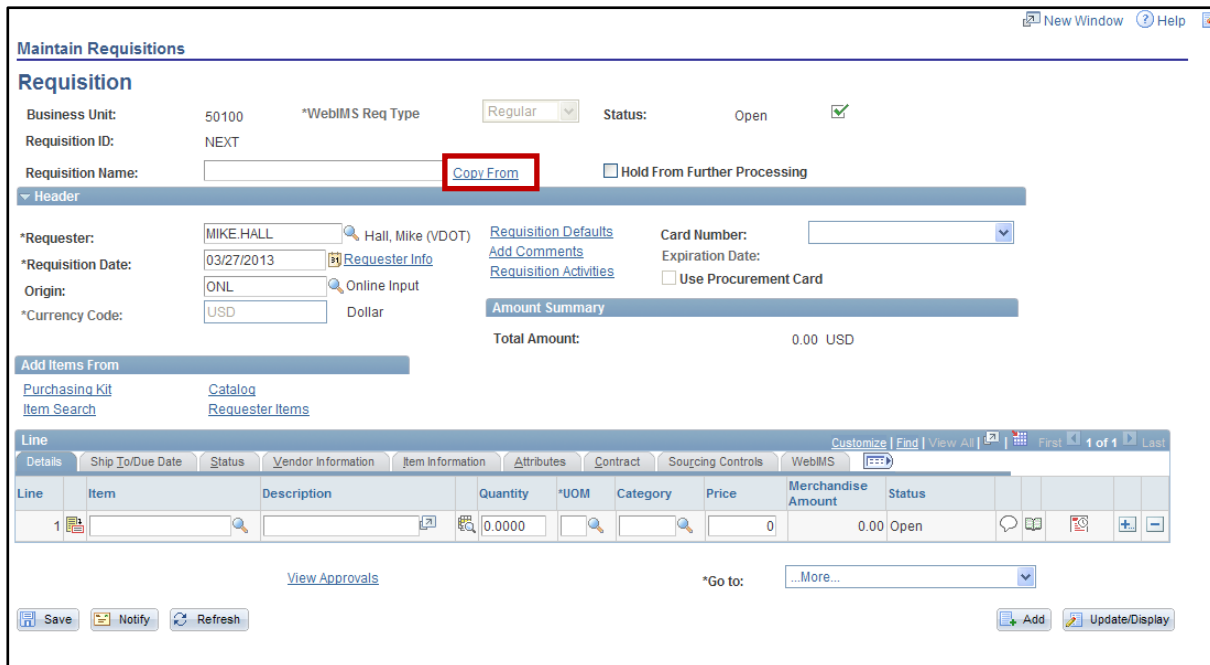
Multiple Approvals
Approval Assignment to Buyer

Comments

[Return to Worklist](#)

31 Once approved, the requisition is forwarded to the Procurement Office for assignment to a buyer.

Create a Requisition from a Requisition:



Maintain Requisitions

Requisition

Business Unit: 50100 *WebIMS Req Type: Regular Status: Open

Requisition ID: NEXT

Requisition Name: [Copy From](#) ☐ Hold From Further Processing

Header

*Requester: MIKE.HALL Hall, Mike (VDOT) [Requisition Defaults](#) [Add Comments](#) [Requisition Activities](#) Card Number:

*Requisition Date: 03/27/2013 [Requester Info](#) Expiration Date:

Origin: ONL Online Input ☐ Use Procurement Card

*Currency Code: USD Dollar

Amount Summary

Total Amount: 0.00 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)

[Item Search](#) [Requester Items](#)

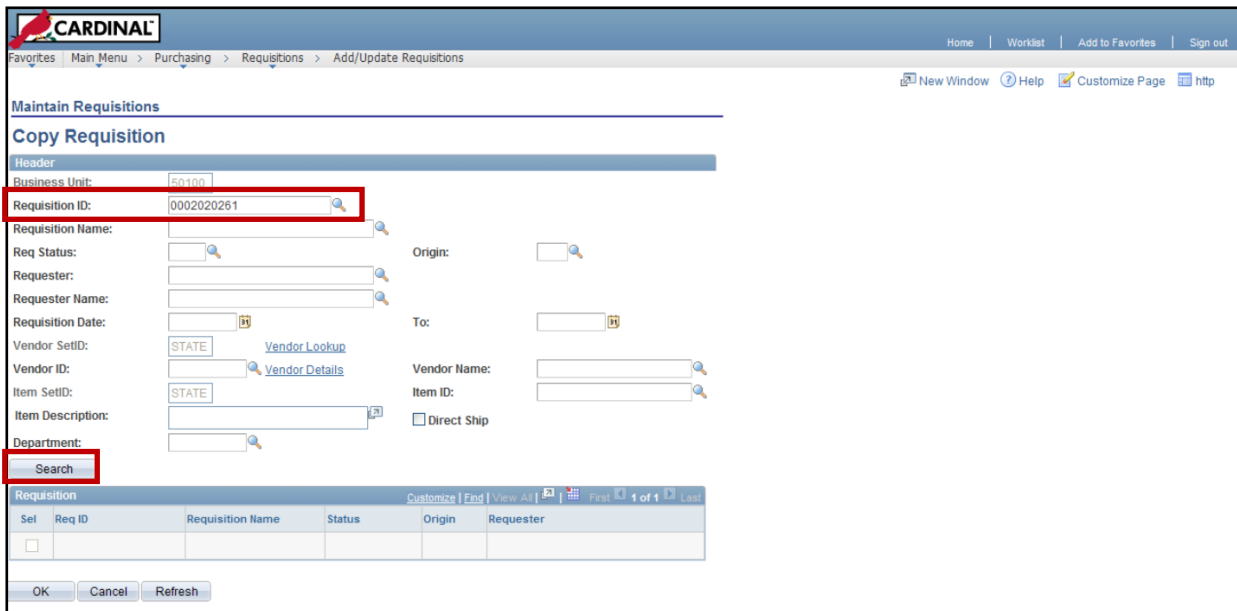
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000			0	0.00	Open

[View Approvals](#) *Go to:

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

- 1 Repeat steps 1-3 (page 1).
- 2 Click on the **Copy From** hyperlink.

Create Requisitions From Contracts and Requisitions



Copy Requisition

Header

Business Unit: 50100

Requisition ID: 0002020261

Requisition Name:

Req Status:

Requester:

Requester Name:

Requisition Date:

Vendor SetID:

Vendor ID:

Item SetID:

Item Description:

Department:

Origin:

To:

Vendor Name:

Item ID:

☐ Direct Ship

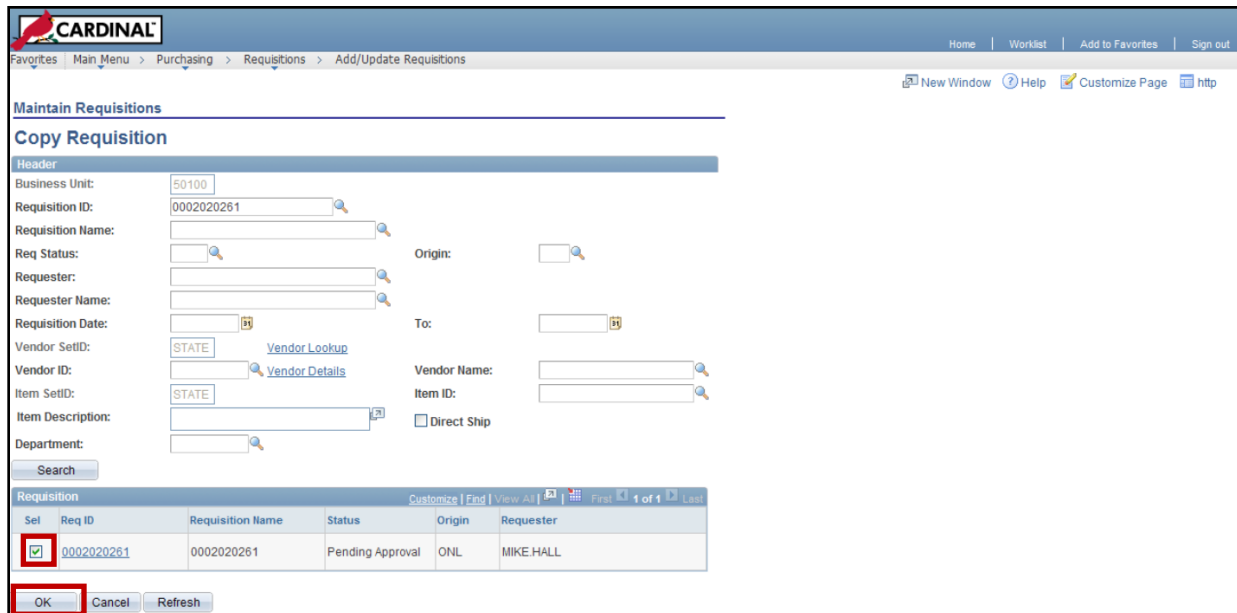
Search

Req ID	Requisition Name	Status	Origin	Requester

OK Cancel Refresh

3 Enter the **Requisition ID** for the requisition you wish to copy.

4 Click **Search** button.



Copy Requisition

Header

Business Unit: 50100

Requisition ID: 0002020261

Requisition Name:

Req Status:

Requester:

Requester Name:

Requisition Date:

Vendor SetID:

Vendor ID:

Item SetID:

Item Description:

Department:

Origin:

To:

Vendor Name:

Item ID:

☐ Direct Ship

Search

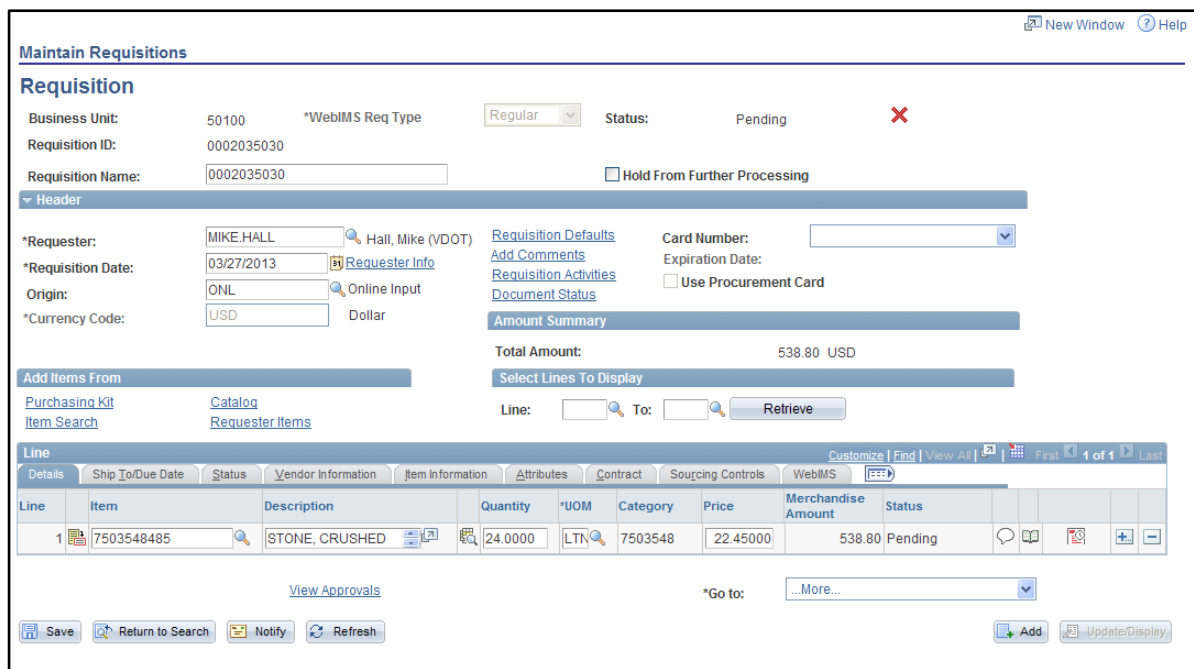
Sel	Req ID	Requisition Name	Status	Origin	Requester
<input checked="" type="checkbox"/>	0002020261	0002020261	Pending Approval	ONL	MIKE HALL

OK Cancel Refresh

5 From the search results, located below the **Search** button, select the requisition by clicking on the **Sel** box.

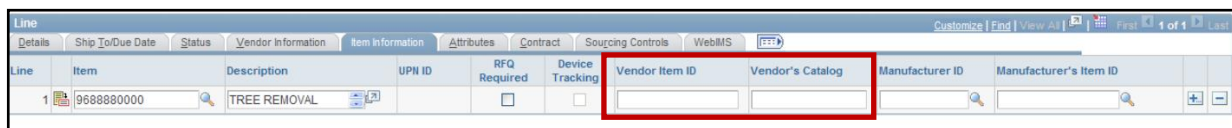
6 Click **OK** to select that requisition to copy.

Create Requisitions From Contracts and Requisitions

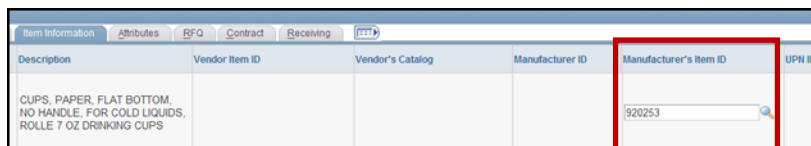


- 7 The Requisition is displayed with all copied values, including accounting distribution.
- 8 Repeat steps 13-24 from above as applicable. Be careful to review and update all fields, such as quantity and accounting distribution, as needed. The requisition is complete and pending approval.

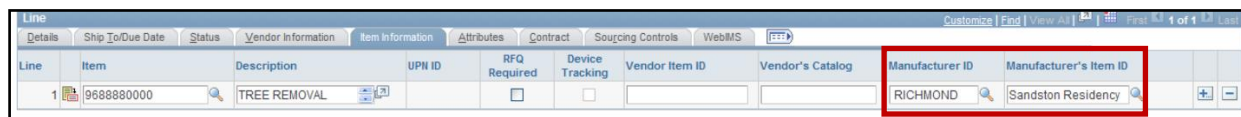
Requisition Helpful Hints – Item Information:



- 1 The **Item Information** tab allows you to enter specific vendor item information, e.g., Grainger Catalog, Version 13, pg 6. Item # XXXXXX.



- 2 For VDC (Virginia Distribution Center) related items, use the **Manufacturer's Item ID** field to insert VDC stock item number.



- 3 To specify a District/CO and District/Division location, use the **Manufacturer ID** and **Manufacturer's Item ID**.